

[National Assembly for Wales](#)
[Enterprise and Business Committee](#)
[Inquiry into Tourism](#)

Evidence from Pembrokeshire Tourism – TOU 10

Consultation Response to the:
Enterprise and Business Committee – Inquiry into Tourism
May 2014

Pembrokeshire Tourism
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1. Industry Representation

Pembrokeshire Tourism

1.1 Pembrokeshire Tourism (PT) is the leading independent representative trade association for the tourism trade in Pembrokeshire. We liaise with and co-ordinate the views of all concerned, informing and working with the local authority, Pembrokeshire Coast National Park and Members of Parliament and Assembly Members.

1.2 PT also acts as an intermediary between Visit Wales, Welsh Government and all involved in tourism, to provide timely and appropriate information to our members, and the broader trade in the county, whilst also working colleagues in our 'sister' organisations, Carmathen Tourist Association and Tourism Swansea Bay as well as other groups involved at a more local level e.g. Town Chambers of Tourism.

1.3 The membership of PT includes businesses from all sectors of the industry – accommodation (hotels, guest houses, B&B establishments, holiday home parks, touring caravan and camping sites, self catering cottages and hostels), attractions, activities, tourism skills, transport, training and skills, and other businesses within the supply chain such as website designers, food and drink suppliers and legal services.

1.4 Pembrokeshire Tourism has a membership totalling 478 tourism businesses across the county, ranging from small owner-managed micro businesses, to large theme parks employing in excess of 100 staff. We provide support to these businesses in a manner of different formats, from networking and training opportunities to representation on local business fora and panels, including through our working arrangements with the local authority, the Swansea Bay City Region.

1.5 Our position as a core stakeholder of the Destination Pembrokeshire Partnership puts us at the forefront of private sector representation and engagement in the continuing development of private-public sector collaborative working in Pembrokeshire, in line with the expectations of the Welsh Government Strategy for Tourism, Partnership for Growth.

2. Our response to the inquiry.

2.1 We will take each term of reference individually and provide evidence where appropriate.

2.2 To assess progress made by the Welsh Government towards achieving its Programme for Government commitments relating to tourism, as well as the suitability of these aims.

2.2.1 We are only able to provide anecdotal evidence here. The Partnership for Growth Tourism Strategy 2013 – 2020 has only been operational for a year, and it is difficult to assess the progress made against that to date. Additionally there has been a significant change in the key personnel at the top of Visit Wales meaning that there is essentially a new team in charge who as yet have not had the opportunity to actively progress within their role and remit.

2.2.2 There are a range of different measurements used across the industry to assess revenue, visitor numbers, occupancy and so on. As such determining a definite set of figures is challenging, so again it is currently not straightforward to assess the impact of the Welsh Government aims at present.

2.2.3 The “brand” for Wales is beginning to strengthen, however the very nature of the country and all it offers makes it extremely difficult to generate a single unifying brand. It is however important to ensure that fair representation is given to various sectors, and at a range of market levels.

2.3 To assess the ambition and deliverability of the Welsh Government’s aim to grow tourism earnings by 10 percent by 2020, as well as progress made towards this aim.

2.3.1 This is a commendable aim, and recent statistics shared by Visit Wales suggest that progress towards this is good. There will be challenges ahead as the economy continues to be unpredictable in certain areas to see this fully realized, and it will also be important to ensure that all businesses within the sector, regardless of perceived target market (budget through to luxury) are supported in order to contribute to this.

2.3.2 Defining a means of measurement to assess how well this aim is met and communicating that across all levels of the industry to enable clarity is important to enable all tourism operators to understand their role and involvement in delivering this.

2.4. To assess the suitability and effectiveness of the structures and support the Welsh Government has in place for the tourism industry in Wales, and it’s future plans for regional support.

2.4.1 The current structures in place, namely the Regional Tourism Partnerships are to be disbanded from the 30th September 2014. Here in the South West Wales region this structure has been particularly effective and supported the delivery of significant activity across the region in providing opportunities for the industry to grow and develop. It is understood that this has not necessarily been the case in other parts of Wales.

2.4.2 At present, the detail regarding the proposed replacement for the Regional Tourism Partnerships is limited, and this is causing concern particularly for organisations such as Pembrokeshire Tourism who have previously been contracted by the South West Wales Tourism Partnership to provide a range of activities and opportunities to strengthen trade engagement and support.

2.4.3 There are concerns that the proposed Regional Engagement Teams that will be managed by Visit Wales and it is understood based in Welsh Government offices regionally will struggle to foster strong engagement relationships with the trade following a significant number of personnel changes within Visit Wales and as such as lack of clarity for the trade on who is responsible for what within the organisation.

2.4.4 Given that the changes to the structures have already been made, it would appear to be the wrong time to ask this particular question, as the new structure is yet to be established and tested. Whilst the RTP structure is acknowledged not to have worked in all areas of Wales, it was successful in the South West Wales region, and indeed recognized as an exemplar model, yet it would appear that this is not likely to be taken forward for further development.

3. Summary

3.1. It is noted that a significant amount of time has been invested in the development of the tourism strategy. There have been concerns raised that the various consultation opportunities during the development stages were not as broad or representative as they could have been, however that is now in the past.

3.2 As an organisation, our primary concerns are based around industry engagement between the trade and Visit Wales. Whilst we are able to monitor visitor numbers and spend through partnerships with the local authority, the last major survey on this was undertaken prior to the commencement of the current strategy programme. Anecdotal evidence suggests that visitors numbers increased during 2013, however this is also due to the improvement in weather, which has again provided a boost for this forthcoming season. It is difficult to assess whether this upturn is also attributable to the Visit Wales campaigns.

3.3 Where we are based in the overall structure of tourism in Wales we are not able to determine the nature of the working relationships between bodies such as Visit Wales and Visit Britain.

3.4 Major events do play a role in the tourism offering. Here in Pembrokeshire, the Ironman Wales event has boosted the visitor economy significantly and it is important that such events continue to be supported, whilst also being sensitively managed to ensure the balance between the built and natural environment is maintained.

3.5 Full analysis of the Welsh Government's Programme for Government and its commitments relating to tourism is difficult to do at this point in time as the strategy has only been operation for 12 months, and there are continuing changes still being made 'behind the scenes' in terms of the structures and personnel involved.

***Maudie Hughes, Chief Executive Officer
For and on behalf of the Board of Directors, Pembrokeshire Tourism Ltd***

May 2014